



STONE OAK THERAPY SERVICES & LEARNING INSTITUTE

1020 Central Parkway South, San Antonio, TX 78232 Phone (210) 798-CARE (2273) Fax (210) 495-1479
 Email address stoneoaktherapy@gmail.com Website www.stoneoaktherapy.com

STONE OAK THERAPY SERVICES & LEARNING INSTITUTE Patient & Insurance Information Sheet

Dear Parent,

We are pleased that you are considering our center for your child's services. In order to provide the best care possible and to expedite scheduling your child's initial appointment with us, please use this check list to track the documents you need to sign and return to us.

- Patient-Parent Handbook
- Patient & Insurance Information
- Consent for Release of Information
- Terms of Service and Payment Agreement (Insured Pay & Private Pay)
- Signature to verify Receipt of HIPAA Privacy Notice, Our Privacy Practices
- Medical-Social History
- Additional information such as reports from consultations or assessments provided by physicians, therapists and school district
- Release and Waiver of Liability Assumption of Risk and Indemnity Agreement

PATIENT INFORMATION

PATIENT NAME:	DOB:
SSN:	MALE FEMALE
ADDRESS: CITY AND ZIP	HOME PHONE: () -
EMAIL ADDRESS:	WORK PHONE: () -
PARENT OR GUARDIAN:	ALTERNATE PHONE: () -
EMERGENCY CONTACT:	EMERGENCY CONTACT PHONE:
RELATIONSHIP TO PATIENT:	() -

INSURANCE INFORMATION

PRIMARY INSURANCE:	POLICY NUMBER:
POLICY HOLDER:	GROUP NUMBER:
INSURANCE PHONE NUMBER:	SSN:
POLICY HOLDER D.O.B.	RELATIONSHIP:
EMPLOYER NAME:	EMPLOYER PHONE:
SECONDARY INSURANCE:	POLICY NUMBER:
POLICY HOLDER:	GROUP NUMBER:
INSURANCE PHONE NUMBER:	SSN:
POLICY HOLDER D.O.B.	RELATIONSHIP:
EMPLOYER NAME:	EMPLOYER PHONE:

PRIMARY CARE PHYSICIAN INFORMATION

NAME OF PRIMARY CARE PHYSICIAN:	OFFICE PHONE: () -
ADDRESS:	OFFICE FAX: () -



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CONSENT TO TREATMENT AND RELEASE OF INFORMATION

I authorize the staff of Stone Oak Therapy Services to:

1. Administer and perform those treatments that have been prescribed by my or by my child's physician.
2. Release pertinent medical information to my/my child's physician, referring agency, or insurer and others as may be required.
3. Request and obtain medical information from my/my child's physician and other health care professionals as necessary to provide quality therapy services.

Printed Name of Patient

Printed Name of Responsible Party

Relationship to Patient

Signature of Responsible Party

Date

Terms of Service and Payment Agreement

INSURED PATIENT:

I authorize Stone Oak Therapy Services to submit claims for services rendered to my insurance carrier or third party payer, and I request payment for these services be made directly to Stone Oak Therapy Services or its designee.

I understand that some services may not be covered by my insurance plan, or may be reimbursed at a much lower rate than what is usual and customary for this area. I further understand that I am responsible for any and all charges for services rendered that are not paid by my insurance carrier. This includes any fees incurred by Stone Oak Therapy Services in the event that my account must be forwarded to a collection agency due to non-payment.

ALL REQUIRED PAYMENTS ARE DUE AT THE TIME OF SERVICE.

Full payment at the time of service will be required. If Stone Oak Therapy Services is unable to bill my carrier directly, an invoice will be provided for me to submit to my carrier for reimbursement.

PRIVATE PAY PATIENT:

I accept responsibility for any and all charges for services provided to me/my child by Stone Oak Therapy Services. This includes any fees incurred by Stone Oak Therapy Services in the event that my account must be forwarded to a collection agency due to non-payment.

Full payment is due at the time of service/as indicated on statements sent to me by Stone Oak Therapy Services. My account will be considered delinquent if payment is not received within ten days of the payment due date listed on my statement. I understand that therapy services may be discontinued if my account becomes delinquent.

Parent Signature

Date



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PATIENT ACKNOWLEDGEMENT OF RECEIPT OF PRIVACY NOTICE

I have been presented with a copy of the Stone Oak Therapy Services and Learning Institute's **NOTICE OF PRIVACY PRACTICES**, detailing how my information may be used and disclosed as permitted under federal and state law. I understand the contents of the Notice, and I request the following restriction(s) concerning the use of my personal or my child's personal medical information:

Further, I permit a copy of this authorization to be used in place of the original, and request payment of medical insurance benefits either to myself or to the party who accepts assignment. Regulations pertaining to medical assignment of benefits apply.

Parent or Guardian of Patient _____ Date _____ Relationship to Patient _____
Printed Name: _____

IF PARENT OR GUARDIAN OF PATIENT REFUSES TO SIGN, INDICATE YOUR ATTEMPT TO OBTAIN A SIGNATURE BELOW.

() Parent or Guardian of Patient refused to sign this Acknowledgement.

Print Name _____ Date _____

Employee Printed Name and Signature: _____

RELEASE AND WAIVER OF LIABILITY ASSUMPTION OF RISK AND INDEMNITY AGREEMENT

In consideration of me or my child receiving services at Stone Oak Therapy Services and Learning Institute, the undersigned (representing all parties affiliated with the patient and/or student), in full recognition and appreciation of the dangers and risks inherent in such therapeutic activities associated with helping children with cognitive and/or physically disabilities, do hereby waive, release, and forever discharge Stone Oak Therapy Services and Learning Institute, its parent and affiliate organizations, its officers, agents and employees from and against all claims, demands, action or causes of action for costs, expenses or damages to personal property or personal injury, or death which may result from such participation in these activities.

The undersigned also acknowledges that injuries received may be compounded or increased by negligent rescue operations or procedures. This waiver of liability extends to any rescue operations performed by the staff on the premises or on route to an emergency medical facility.

The undersigned affirms that all health information pertaining to the patient and/or student has been divulged prior to services being rendered. The undersigned acknowledges that s/he retains general medical/health insurance to cover any such accidents in the event they do occur.

This waiver is intended to be as broad and inclusive as is permitted by law and that if any portion is held invalid, it is agreed that the balance shall, notwithstanding, continue in full legal force and effect.

I have read this release and waiver of liability, assumption of risk and indemnity agreement, fully understand its terms, understand that I have given up substantial rights by signing it, and have signed it freely and voluntarily without any inducement, assurance, or guarantee being made to me and intend my signature to be a complete and unconditional release of all liability to the greatest extent allowed by law.

Patient or Student's Name

Parent's Name

Date

Birth to 3 Years Old Information

HEALTH SCREENING & EARLY DEVELOPMENT

Developmental milestones: Please describe the age at which your child mastered the following activities: Use Months or years.

Cooing: _____ Babbling _____ First words _____ Two-Word Combinations (i.e. mommy bye-bye, milk gone) _____ Simple Sentences (i.e. I want to play outside), _____ Complex Sentences (i.e. "she said she didn't want to play anymore because I wouldn't let her have my Barbie") _____ Speech that is between 75% to 90% clear to an unfamiliar listener _____

Assemble 3 piece puzzle : _____ 12 piece puzzle _____ 24 piece puzzle _____ Give complete answers that make sense to open ended questions asked such as "why do kids need to brush their teeth? " _____ Participate in a group activity without redirection (finger plays, singing in circle time, arts & craft), _____ Follow simple directions ("go get your shoes") _____ Follow complex directions ("go get the dictionary which is on the second shelf of the bookcase in the den) _____ Rolling over: _____ sitting alone _____ Crawling _____ Pulling up to stand _____ Walking _____ Running _____ Throwing overhand _____ Picking up small objects with hands (cheerios, raisins) _____ Pass toys from one hand to another or play with a toy using both hands _____ Scribbling with a crayon _____ Writing letters _____ Toilet training _____ Drink from an open cup with minimum spillage _____ Hold a spoon/ fork to self feed with minimum mess _____ feed himself/herself _____ Brush teeth alone _____ use the potty alone _____ get dressed by himself _____

Has your child had problems with any of the following? (Yes or No) If yes, please explain.

Vision (wears glasses, etc.) _____

Hearing (hearing aides, etc.) _____

What is the date of most recent Vision and Hearing Screening? _____ Vision _____ Hearing _____

If your Child has never had a formal Vision and Hearing Test, would you or your physician attest to your child's vision and hearing skills to be functional and adequate for developmental testing (Speech, PT, OT, etc.)? _____

Are there any concerns regarding:

Speech _____

Coordination (running, throwing, writing, etc.) _____

Serious illnesses (Complications with childhood illnesses, high fever, etc.) _____

Has your child participated in an Early Childhood Intervention Program? _____ If yes, please describe services received, provider, and length of service: _____

MEDICAL HISTORY

Are immunizations up to date? _____ If not, what immunizations are missing? _____

Does your child receive annual flu vaccines? _____ List dates received: _____

Hospitalizations (accidents, etc.) _____

Surgeries: _____

Current Medications (type, purpose): _____

Date of most recent physical: _____ Physician: _____

Check the appropriate items that apply to your child's' health condition(s) and childhood illnesses.

- | | | |
|--|---|--|
| <input type="checkbox"/> Allergies | <input type="checkbox"/> Heart trouble | <input type="checkbox"/> Vision problems |
| <input type="checkbox"/> Asthma | <input type="checkbox"/> Joint pains | <input type="checkbox"/> Chicken pox |
| <input type="checkbox"/> Chest pains | <input type="checkbox"/> Reaction to drugs | <input type="checkbox"/> Diphtheria |
| <input type="checkbox"/> Colds (frequent/severe) | <input type="checkbox"/> Skin rashes or eczema | <input type="checkbox"/> Measles |
| <input type="checkbox"/> Convulsions or seizures | <input type="checkbox"/> Stomach disorder or abdominal pain | <input type="checkbox"/> Mumps |
| <input type="checkbox"/> Ear trouble | <input type="checkbox"/> Tumor or growth | <input type="checkbox"/> Pneumonia |
| <input type="checkbox"/> Frequent sore throats | <input type="checkbox"/> Urinary infection | <input type="checkbox"/> Rheumatic Fever |
| <input type="checkbox"/> Headaches (frequent) | <input type="checkbox"/> Minor/Major Head Injury | |

Other: _____

Please explain any areas checked above: _____

Diagnosis (describe each and when diagnosed): _____

CURRENT THERAPY SERVICES (PT, OT, ST, Behavioral Support, at school or in the community):					
List Current Outpatient Therapists as follows:					
Services	Date Initiated	Length of Service	Name of Provider	Address/Phone	Frequency

PREVIOUS THERAPY SERVICES (PT, OT, ST, Behavioral Support at school or in the community):					
List Previous Outpatient Therapists as follows:					
Services	Date Initiated	Length of Service	Name of Provider	Address/Phone	Frequency

EVALUATIONS OR TESTS PERFORMED (ST, OT, PT, Neurological, MRI, X-Rays, Behavioral, Psychological, at school or in the community etc.) List Evaluations or Tests Performed as follows:					
Type of Evaluations or Test Performed	Date	Where	Name of Provider	Address/Phone	Written Report Received

FAMILY DYNAMICS:
 Child lives with: ___ Both Parents ___ Father ___ Mother ___ Other (Explain): _____
 Parents are: ___ Married ___ Divorced ___ Separated

 Father/Stepfather-please underline _____ Age _____ Years of School Completed _____ Occupation _____
 Mother/Stepmother-please underline _____ Age _____ Years of School Completed _____ Occupation _____

Brothers/Sisters Stepbrothers/Stepsisters	Sex	Age	School	Grade or Occupation	Living in Home Yes or No

Other persons residing in the home (grandparents, etc.) _____

Does your child get along with other family members? ___ If no, please explain: _____

Does your child get along with others his/her age in the neighborhood? ___ If no, please explain: _____

Does your child get along with others at school? ___ If no, please explain: _____

Is the child able to care for self (dressing, eating, personal hygiene, bathroom care, shopping, making change, telling time, using phone, etc.) in manner appropriate for his/her age? ___ If no, please explain: _____

Does your child assume responsibilities within the family, which are age appropriate? ___ If no, please explain: _____

Regular chores/home responsibilities of child: _____

What tools, appliances or machinery is your child able to handle? _____

Is your child trusted and able to go about in the neighborhood, to school, and to town alone, appropriately for age? ___ If no, please explain: _____

Part-time jobs or work child has done to earn money: _____

Methods of discipline at home (restriction, spanking, etc.) _____

Educational History
 At what age did your child enter school? ____ Number of schools attended? ____ Please list below:

School	City and State	Grade Level

Grades Repeated: _____ Reason(s): _____

When did your child begin having problems: _____
 Does your child enjoy school? _____ Being with other students? _____
 Subjects your child likes _____ Dislikes _____
 Amount of time spent on homework at night: _____ Who helps your child with homework, if needed: _____

Academic Difficulties

___ Reading	___ Distractible	___ Slow writer	___ Following directions
___ Math	___ Restless	___ Poorly organizes	___ Remembering information
___ Spelling	___ Hyperactive	___ Finishing tasks	___ Short attention span

Please check the following that best describes your child by using the scale to your right.	Often	Seldom	Never	COMMENTS
friendly				
even temper ed				
trust worthy				
cooperative				
active				
easily goes to bed				
non-aggressive				
gets along well with others				
perfectionist				
sucks thumb				
worries				
stubborn				
easy going				
happy				
outgoing				
bites nails				
likeable				
confident of self				
toilet trained				
continent				
dependable				
awkward or clumsy				
gets along with adults				
polite				
competitive				
sleeps well				
eats well				
Other:				

Personal Characteristics: Please indicate how often these behaviors occur in the child by circling the letter that most often describes it. O = Often S = Seldom N = Never

Behavior	O	S	N	Behavior	O	S	N	Behavior	O	S	N
Sleeplessness	O	S	N	Selfishness	O	S	N	Thumb sucking	O	S	N
Nightmares	O	S	N	Lying	O	S	N	Strong fears	O	S	N
Bedwetting	O	S	N	Excitability	O	S	N	Whining	O	S	N
Nervousness	O	S	N	Easily discouraged	O	S	N	Temper tantrums	O	S	N
Walking in Sleep	O	S	N	Convulsive attacks	O	S	N	Playing with sex organ	O	S	N
Shyness	O	S	N	Jealousy	O	S	N	Destructiveness	O	S	N
Showing off	O	S	N	Rudeness	O	S	N	Hurting pets	O	S	N
Refusal to obey	O	S	N	Fighting	O	S	N	Unusually quiet or serious	O	S	N
Stubborn	O	S	N	Bites Nails	O	S	N	Worries	O	S	N
Perfectionist	O	S	N	Awkward/Clumsy	O	S	N		O	S	N

If your child has been diagnosed with an orthopedic impairment, please complete the following:

Diagnosis: _____
 Onset of Diagnosis: _____
 Is your child seen regularly by an orthopedist and/or neurologist? ____ If, yes how frequently does your child see each specialist? _____
 If no, when was the last visit with each specialist? _____
 Please List Durable Medical Equipment your child currently uses:

Does your child use Orthotics (AFO, DAFO, Orthotic braces): _____
 Date of most recent Orthotics Manufactured with Vendor Name: _____

Has your child been seen at a Spasticity Clinic? ____ If yes, list name of Spasticity Clinic, dates, locations and recommendations: _____

Has your child had any orthopedic surgeries? ____ If yes, please list type, dates, surgeon name and results of surgery: _____

Has your child receive Botox Treatments? ____ If yes, please list dates, who administered treatment, locations of injections, and results: _____

Does your child participate in PE at school? ____ Is it adaptive PE? ____ If so how often is Adaptive PE Services provided _____

Does your child participate in Adaptive Recreational Activities or Sports? ____ If so, please describe: _____

Describe how your child moves around environment, at home, in public, school, short and long distances: _____

Are there any precautions/contraindications? ____ If yes, please describe: _____

What are your concerns regarding your child's orthopedic impairment and developing skills? _____

Please check the following that best describes your child by using the scale at the right. Does your child exhibit the following behaviors:	Always	Most of The Time	Sometimes	Not Frequently	Never
Dressing, Bathing, Touch					
Distressed when diapered or when diaper needs changing					
Prefers certain clothing, complains that certain garments are too tight or itchy (for infants over 15 months)					
Distressed by having hair or face washed, or bathing.					
Distressed when clothes removed					
Resists cuddling, pulls away or arches					
Doesn't notice pain when falling, bumping, or when the doctor gives shot					
Dislikes messy play					
Movement					
In constant motion, rocking, running about, unable to sit still for an activity					
Absent or brief crawling before walking (over 1 year)					
Distressed by being swung in air, swings, merry-go-rounds, car rides					
Craves swinging and moving upside down					
Clumsy, falling, poor balance, bumps into things (over 1 year)					

Fearful or hesitancy moving over changing surfaces (e.g. sidewalk to grass, carpet to wood floor)					
Dislikes laying on back					
Listening, Language, and Sound					
Distressed by common sounds (e.g. music, singing, vacuuming, flushing toilet, raised voices)					
Doesn't respond to verbal cues (hearing not a problem, over 1 year)					
None or very little vocalizing or babbling					
Distracted by sounds not normally noticed by average person (e.g. furnace, refrigerator)					
Looking and Sight					
Have diagnosed visual problem					
Have trouble following with eyes					
Squints often					
Sensitive to bright lights, cries or closes eyes					
Avoids eye contact, turns away from the human face					
Becomes overly excited or falls asleep in crowded bustling settings such as a crowded supermarket, restaurant (over 1 year)					
Cannot pay attention with more than one toy or food item in view					
Play Abilities					
Does not show ability for imitative play (older than 10 months)					
Wanders around aimlessly without focused exploration or purposeful play (over 15 months)					

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Dressing, Bathing, Touch					
Distressed when diapered or when diaper needs changing					
Prefers certain clothing, complains that certain garments are too tight or itchy (for infants over 15 months)					
Distressed by having hair or face washed, or bathing.					
Distressed when clothes removed					
Resists cuddling, pulls away or arches					
Doesn't notice pain when falling, bumping, or when the doctor gives shot					
Dislikes messy play					
Movement					
In constant motion, rocking, running about, unable to sit still for an activity					
Absent or brief crawling before walking (over 1 year)					
Distressed by being swung in air, swings, merry-go-rounds, car rides					
Craves swinging and moving upside down					
Clumsy, falling, poor balance, bumps into things (over 1 year)					
Fearful or hesitancy moving over changing surfaces (e.g. sidewalk to grass, carpet to wood floor)					
Dislikes laying on back					
Listening, Language, and Sound					
Distressed by common sounds (e.g. music, singing, vacuuming, flushing toilet, raised voices)					
Doesn't respond to verbal cues (hearing not a problem, over 1 year)					
None or very little vocalizing or babbling					
Distracted by sounds not normally noticed by average person (e.g. furnace, refrigerator)					
Looking and Sight					
Have diagnosed visual problem					
Have trouble following with eyes					
Squints often					
Sensitive to bright lights, cries or closes eyes					
Avoids eye contact, turns away from the human face					
Becomes overly excited or falls asleep in crowded bustling settings such as a crowded supermarket, restaurant (over 1 year)					
Cannot pay attention with more than one toy or food					

item in view					
Play Abilities					
Does not show ability for imitative play (older than 10 months)					
Wanders around aimlessly without focused exploration or purposeful play (over 15 months)					
Easily breaks toys and other things destructively (over 15 months)					
Needs total control of the environment ("runs the show")					
Amuses self appropriately for brief periods of time					
Engages in repetitive play for long periods of time					
Please check the following that best describes your child by using the scale at the right. Does your child exhibit the following behaviors?	Always	Most of The Time	Sometimes	Not Frequently	Never
Emotional Attachment/Emotional Functioning					
Prefers to play more with objects and toys than with people					
Does not interact reciprocally (back and forth exchanges with caregiver)					
Hurts self or others (e.g. head banging, biting, pinching)					
Everyone has difficulty understanding the child's cues or emotions					
Does not seek connection with familiar persons					
Self Regulation					
Excessively irritable, fussy, colicky					
Can't calm self effectively by sucking on pacifier, looking at toys, or listening to caregiver (10 month and older)					
Can't change from one activity to another or from sleeping to awake without distress					
Must be prepared in advanced several times before change is introduced					
Attention					
Easily distractible, fleeting attention					
Over focuses on one activity (e.g. T.V., trains, wheels)					
Too distracted to stay seated for meals					
Eating, Sleeping					
Requires extensive help to fall asleep or wake up Specify: rocking, long walking, stroking of hair or back, car ride					
Extreme food preferences for extended time periods					
Excessive drooling beyond teething stage					
Difficulty with sucking, chewing, swallowing					

Child's Development:

Did your child perform the following things at the approximate ages indicated?

Months Of Age	Language	Y/N	Cognition	Y/N	Social /Environment	Y/N	Gross Motor	Y/N	Fine Motor	Y/N
1-3	Babbles	Y/N	Pays attention to new faces	Y/N	Smiles	Y/N	Holds head up	Y/N	Brings hand to mouth	Y/N
4-7	Responds to sound by making sounds	Y/N	Finds partially hidden objects	Y/N	Likes to be around people	Y/N	Sits	Y/N	Transfers objects from hand to hand	Y/N
8-12	First words like "mama, dada"	Y/N	Points to objects or pictures when named	Y/N	Waves bye-bye, shakes head "no"	Y/N	Crawls	Y/N	Places objects in and out of container	Y/N
12-18	Says about 15 words	Y/N	Knows how to use common objects (cup, toothbrush, comb)	Y/N	Shy or anxious with strangers	Y/N	Walks Alone	Y/N	Picks up things by "pinching"	Y/N
18-24	Uses 2 word sentences, Understands	Y/N	Sorts by shape and color	Y/N	Imitates behavior of others,	Y/N	Kicks a ball	Y/N	Scribbles Builds tower of	Y/N

	simple instructions				especially adults				at least 4 blocks	
2-3 Yrs	Speaks in 4-5 word sentences.	Y/N	Assembles puzzles of 3-4 pieces.	Y/N	Shows affection for familiar playmates.	Y/N	Climbs. Pedals tricycle.	Y/N	Makes Vertical, horizontal, and circular strokes with pencil	Y/N
2-3 Yrs	Strangers understand about 50 to 75% of what child says.	Y/N	Sorts objects by shape and color.	Y/N	Understands concept of "mine, his/hers".	Y/N	Walks up and down stairs alternating feet.	Y/N		
	Understands simple verbal instructions.	Y/N	Plays make believe.	Y/N						

Gross Motor Skills

Please review and complete the section that applies to your child's current age.

If your child is already this age:	Y/N	Is he/she performing these skills?
2 yrs old	Y/N	Going up/down stairs alone one foot at a time
	Y/N	Walks on tip toes
	Y/N	Jumps off floor with both feet leaving floor
3 yrs old	Y/N	Sommersaults forward
	Y/N	Rides tricycle
	Y/N	Stand on one foot 3 – 5 seconds

Fine Motor Skills:

Please review and complete the section that applies to your child's current age.

If your child is already this age:	Y/N	Is he/she performing these skills?
2 yrs old	Y/N	Makes vertical, horizontal and circular strokes with marker
	Y/N	Unscrews lid or turns door handle
	Y/N	Holds marker with fingers
3 yrs old	Y/N	Cuts with scissors
	Y/N	Copies a circle
	Y/N	Holds pencil with thumb and finger

Self Help Skills:

Please review and complete the section that applies to your child's current age.

If your child is already this age:	Y/N	Is he/she performing these skills?
2 yrs old	Y/N	Finger foods independently and uses spoon with some spilling
	Y/N	Attempts to put on some clothes independently
	Y/N	Verbalizes toilet needs
3 yrs old	Y/N	Undresses without help and dresses with supervision and assist for fasteners
	Y/N	May require prompting for toilet use, as well as assist

Speech Therapy Warning Signals. Negative answers to any of these questions indicate the need for a Speech Language Pathology Evaluation.

If your child is already this age:	Y/N	Understanding	Y/N	Expression
3 yrs old	Y/N	Understands simple instructions and concepts like big, little, wet, etc.	Y/N	Uses 4 to 5 words per sentence
	Y/N	Understands common object use	Y/N	Answers Yes/No questions correctly
	Y/N		Y/N	Strangers understand between 50 to 75% of what your child says
3 ½ yrs old	Y/N	Understands instructions that include concepts (space, size, and color)	Y/N	Uses 5-6 words per sentence
	Y/N	Points to colors when named	Y/N	Strangers understand about 75% of what child says
	Y/N	Understands concepts like same, different, heavy, empty	Y/N	States name, age, sex clearly
	Y/N	Groups things	Y/N	Uses basic grammar like plurals (cat, cats) and pronouns (I, you, he, she, they) correctly

